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1 Purchase Orders

Carnegie Mellon authorizes the Purchase Order (PO) Buyer responsibility to certain employees whose positions require them to purchase goods and services for university-related business and who have completed the required Finance trainings. POs are legally binding commitments to third parties. Although they can be utilized at any amount, they are the preferred purchasing method for high-dollar goods or services, goods and services that require a greater element of control or have the potential to present significant legal or commercial risks to the university.

A PO is an online form completed in the Oracle financial system and issued by a university Buyer to a supplier. The PO indicates types, quantities, and agreed upon prices, etc. for goods and/or services that the supplier will provide to Carnegie Mellon. Providing a PO to a supplier constitutes a legal offer to buy the goods and/or services. Supplier acceptance of the PO forms an agreement between the Buyer (Carnegie Mellon) and the supplier. All POs must include the link to the proper PO Terms and Conditions referenced on the face of the PO and available from the Finance Forms page.

All transactions using POs must comply with Carnegie Mellon’s purchasing policies and procedures regarding the purchase of goods and services. This document describes the requirements, responsibilities and procedures particular to the use of POs. Buyers are required to comply with the university’s Buyer’s Code of Ethics and Anti-Kickback Clause.

Buyers must adhere to these guidelines, which are designed to assist the Buyer in making appropriate purchases.

2 Roles and Responsibilities

It is essential for Carnegie Mellon to maintain an environment where the university is able to conduct business efficiently, effectively, and ethically with its suppliers while meeting its obligations to comply with generally accepted accounting principles and the applicable laws and regulations of the countries where Carnegie Mellon conducts business. This requires Buyers to fulfill their roles and responsibilities when making purchases on the university’s behalf.

Collaboration of teams and individuals across the university is required to ensure that Carnegie Mellon is able to serve the campus community while meeting its compliance obligations.

This process includes Department and Administrative Unit responsibilities, which include Administrative Leadership Group (ALG) Member Responsibilities, Buyer Responsibilities, Requisition Requestors and Approver Responsibilities; and Finance Division Responsibilities.

2.1 Department and Administrative Unit Responsibilities

Carnegie Mellon’s operations are generally decentralized; leaving the authority and accountability for university-related purchasing decisions for a Department within the Department making the purchase.

Purchasing responsibilities are delegated to several roles within the university: the Department (generally through the Department’s designated Administrative Group Leader member and/or Business Manager), the Approver (including checkpoint approver), the Buyer and the Requisition Requestor.
2.1.1 Designated ALG Member

It is the responsibility of the designated ALG member to:

- ensure that departments and Buyers within their organization are accountable for compliance with the policies and procedures for purchasing;
- approve requests for access to the Oracle financial system;
- evaluate and approve or reject requests for exceptions to policies and procedures; and
- determine if further action is necessary to reduce the amount of sales tax that was paid by the university.

2.1.2 Department

It is the responsibility of the Department to inform the Financial Systems Help Desk if any potential violations or suspected misuse is identified.

2.1.3 Buyer

It is the responsibility of the Buyer to:

- know the source of funds to be utilized;
- comply with the prescribed policies and procedures established for purchasing, including:
  - CMU’s Purchasing Policy
  - Procurement Manual,
  - Buyer’s Code of Ethics,
  - Foreign Corrupt Practices Act (FCPA) Guidance,
  - Anti-Kickback Clause, and
  - Buyer’s Actions Matrix;
- follow award specific guidelines as appropriate;
- only make purchases for university-related business;
- comply with the university’s and the Department’s process for record retention;
- ensure charges are charged to the appropriate Oracle general ledger or grants management string;
- ensure that sales tax is not paid for exempt purchases (see Section 5.8 Sales Tax Exemption).

Prior to placing an order with a supplier, it is the responsibility of the Buyer to ensure that the below actions are completed:

- determine need and prepare/understand specifications of what is needed;
- conduct competitive bidding when the value of purchases is expected to exceed competitive bidding thresholds per the Buyer Actions Matrix & Guide;
- select supplier and rationalize choice as required;
- negotiate appropriate business terms, if not already in place;
- document price reasonableness as required;
- notify and coordinate with the University Contracts Office (UCO) to ensure any necessary contractual agreements are put in place per Supplier Contracting Guidelines;
- create PO in the Oracle financial system;
- obtain appropriate approvals; and
- complete the Purchasing Checklist and Bid Summary Form, as required.
After the order has been placed with the supplier, it is the responsibility of the Buyer to ensure that the below actions are completed:

- physically receive goods (if applicable) and compare receipt with original order;
- ensure that suppliers provide the services and deliverables subject to their contractual requirements;
- negotiate settlements of disputes with supplier (with assistance from Procurement Services, if desired);
- electronically receive the goods and services in the Oracle financial system to indicate acceptance and indicate readiness for payment;
- provide Procurement Services with appropriate documentation supporting transactions placed on POs, as required;
- maintain documentation supporting transactions placed on POs in accordance with the Policy for Financial Records Retention; and
- provide invoices and packing slips to AP as necessary.

It is the Buyer’s responsibility to perform purchasing duties in compliance with Carnegie Mellon purchasing policies and procedures. In addition, Buyers can request the assistance of Procurement Services during the procurement process.

2.1.4 Requisition Requestors

Requisitions are optional in the USA ledger, but are required in the AUS and QAR ledgers.

It is the responsibility of the Requisition Requestor to:

- determine needs for goods or services that will be procured with a PO;
- enter a requisition in the Oracle financial system;
- suggest a specific supplier for each requisition line, as applicable;
- identify a Buyer for each requisition line and
- indicate ebTax classifications for AUS requisitions.

2.1.5 Approver

The Approver is responsible for reviewing the PO and supporting documentation to ensure that transactions:

- know the source of funds to be utilized;
- represent appropriate university-related business expenses and have proper business justifications;
- are in compliance with the university’s policies and procedures;
- are charged to the appropriate Oracle general ledger or grants management string;
- meet documentation requirements including: executed contracts, UCO approvals, completed gift/prize/award processing forms, Purchasing Checklist & Bid Summary Forms, etc.; and
- do not include sales tax on exempt purchases (see Section 3.4 Sales Tax Exemption).
2.2 **Finance Division Responsibilities**

The Finance Division administers the Purchasing program and the Oracle financial system at Carnegie Mellon. It is the responsibility of the Finance Division to:

- establish policies and procedures that meet the requirements established by applicable laws and regulations, accounting standards and the university’s Board of Trustees;
- provide training regarding policies and procedures for campus;
- communicate changes to university policies and procedures (related to finance) to campus;
- manage requests for exceptions to policies and maintain records of approved exceptions;
- provide and maintain the Oracle financial system for the processing and management of university transactions;
- administer the process of enrolling new Oracle users and processing changes to current Oracle user responsibilities;
- provide Help Desk support for the Oracle financial system and other finance systems;
- approve or reject PO transactions routed to Finance for approval;
- coordinate with the UCO to maintain standard PO Terms and Conditions;
- maintain records of required supporting documentation forwarded by Buyers, including Purchasing Checklist & Bid Summary Forms;
- manage the Preferred Supplier program and the process for entering all suppliers into the Oracle financial System;
- maintain Carnegie Mellon’s supplier information (including applicable tax documentation) in the Oracle financial system;
- pay suppliers when appropriate invoices/PO matches and/or approvals have occurred; and
- audit transaction activity for compliance as required.

3 **Utilizing Purchase Orders**

3.1 **When is a PO Required?**

POs are designed to allow Carnegie Mellon Buyers the ability to purchase high-value and/or high-risk goods and services that cannot be purchased with the university Purchasing Card.

3.1.1 **Purchases using Federal Funds**

A PO must be utilized when the funding source is federal and the PO is from:
- a non-Preferred Supplier with a PO value equal to or exceeding $2,500 or
- any supplier with a PO value equal to or exceeding $10,000.

3.1.2 **Equipment or Furniture Purchases**

A PO can be used for the purchase of equipment (including fabricated equipment component parts) and furniture at any amount, but is required for purchases whose totals equal or exceed $2,500.

- Equipment is “tangible, non-expendable property which is useful in carrying on the operations of the university.”
- Fabricated equipment component parts are “tangible parts and supplies which are used in the self-construction of equipment.”
• Furniture is “the movable, functional articles that equip a room or office. These items are not affixed or part of the real property.”


3.1.3 Services

A PO can be used to pay for services at any amount if the Buyer obtains an executed contract between the supplier of the services and the UCO in advance of the purchase of the services. However, Buyers can enter into transactions (including deposits) that relate to services if a contract has already been executed by or written approval received from the UCO for the services.

For the purchase of services using agency funds, a Buyer must contact the UCO prior to purchase to determine whether a contract is required.

3.1.4 Software

A PO can be used to pay for software at any amount if the Buyer obtains an executed contract between the supplier and the UCO or if the Buyer receives written approval from the UCO in advance of the purchase of the software.

“Software” is any kind of computer program that is loaded onto a computer, or is accessed by a computer, that is not part of the hardware constituting the computer itself. It can be purchased in several forms, such as CD-ROMs, DVDs, downloads, software-as-a-service and subscription technical services sold via the internet. Software may be loaded onto a single computer, or may be accessed through a computer network. Software purchases include click-through licenses, separate license terms and shrink-wrap licenses.

3.1.5 Rental of Storage Space or Facilities/Leased Space

Buyers must use a PO as payment for leased space or rental of storage space or facilities when the rental will be more than a one-time rental. Leased space or storage space/facility rentals include, but are not limited to: the lease or use of office, classroom or laboratory space; storage facilities or units, including PODs, storage units, trailers, or other portable moving containers; and/or the use or lease of private residences.

If a Buyer has a question about whether a rental of a facility constitutes a one-time rental, contact the UCO.

3.1.6 Gas Cylinders, Hazardous Materials and Live Animals

All purchases/rentals of gas cylinders and hazardous materials are required to be procured via PO and require approval from Environmental Health & Safety (EH&S) through a PO workflow checkpoint. Similarly, all purchases/rentals of live animals are required to be procured via PO and require approval from the Office of Research Integrity and Compliance (ORIC) through a PO workflow checkpoint to ensure the requirements of applicable protocols are met.

3.1.7 Employee Moving or Relocation

Buyers must use a PO as payment for employee moving or relocation charges when not an internal move. Internal moves occur where an individual has an existing office or lab space within the university and is moving that office or lab space to another location on campus or to one of the
university’s other branch locations. For an extensive list of what types of expenses are considered moving or relocation expenses, please visit the Relocation FAQs located on the Business & Travel Expense Policy website.

The moving or relocation supplier must have an executed contract in effect with the university prior to work being conducted and in order to request payment from the university.

3.1.8 Travel or Events
Travel or event related purchases can be placed on a PO, but must follow the Business & Travel Expense Policy.

3.2 Prohibited/Restricted Transactions
Carnegie Mellon prohibits and/or restricts the use of POs for certain transactions. These include, but are not limited to:

3.2.1 Personal Purchases
Buyers are prohibited from using a PO to make purchases for personal use.

3.2.2 Alcoholic Beverages
Buyers are not permitted to purchase alcoholic beverages at the Qatar campus, for purchases charged to federally-sponsored projects and/or other projects or programs that prohibit alcohol as an allowable business expense. Buyers should reference the university’s Business & Travel Expense Policy for more detail.

3.2.3 Other
Buyers are required to follow all restrictions and/or special procurement guidelines as outlined in the Restricted Purchase and Special Procurement Guidelines.

3.3 Sales Tax Exemption
Carnegie Mellon is exempt from sales tax on generally all purchases of goods and services for university business in the Commonwealth of Pennsylvania and in many other states/jurisdictions. However, Carnegie Mellon is NOT exempt from all taxes in all states/jurisdictions. For example, Carnegie Mellon is not exempt from certain Pennsylvania local taxes such as the Allegheny County (PA) Alcohol Beverage Tax or the Hotel Occupancy Tax. Complete information on Carnegie Mellon’s tax exemptions can be found on the Taxation website.

Carnegie Mellon’s tax exemption(s) are not transferable and can only be used if the purchase is being made directly with Carnegie Mellon funds, by check, electronic funds transfer, PO, or Purchasing Card. Use of Carnegie Mellon’s tax exemption for personal purchases is illegal, and a violation of university policy.

Most Pennsylvania vendors will require the Buyer to submit a copy of an actual tax exemption certificate for each purchase at the time of purchase. Tax exemption certificates can be obtained from the Taxation website.
3.4 PO Creation Process

Authorized Buyers have the responsibility for the creation of POs in the Oracle financial system prior to the delivery of the goods or services being purchased. Generally, the steps necessary to create a PO are:

1. Define the business need in terms of description of the goods or services, quantity, quality and price; if needed, develop a scope of work. Determine whether a competitive bid process and/or contract is required.
2. If necessary, consult with multiple suppliers on specifications related to the good or service that will assist in defining the purchase.
3. Competitive proposals or quotations should be obtained and documented on a Purchasing Checklist & Bid Summary Form for all transactions of:
   - $2,000 USD for federally funded construction or construction-related items with non-Preferred Suppliers,
   - $2,500 USD for federally funded general items/services with non-Preferred Suppliers,
   - $5,000 USD using university or non-federal sponsored funds with non-Preferred Suppliers,
   - $50,000 USD for federally funded construction or construction-related items with Preferred Suppliers, and
   - $100,000 regardless of the source of funds or type of supplier utilized.

Additional details related to action and documentation requirements can be found in the Buyer Actions Matrix & Guide based on funding source, supplier type and total purchase amount.
4. Determine whether the chosen supplier has been set-up in the Oracle financial system. If the supplier has not been set-up, reference the Guide to Supplier Forms to determine the appropriate forms that the supplier will need to complete. Supplier forms can be found under the Supplier Related Forms section of the Finance Division Forms Page.
5. Ensure that the Supplier Contracting Guidelines are followed, if required for your purchase.
7. Submit the PO for approval in the Oracle financial system. Once submitted, the PO will be systematically routed for approval.
8. Complete required purchasing documentation and submit appropriately. Depending on what is being purchased, the type of supplier, purchase amount and source of funding, documentation in addition to the PO may be required. Documentation should be scanned and sent to procurement-inbox@andrew.cmu.edu.
9. Upon completion of all necessary approvals, the PO must be provided to the supplier. Sending a PO to a supplier constitutes a legal offer to buy goods and/or services. Acceptance of a PO by a supplier forms an agreement between the Buyer (Carnegie Mellon) and the seller.
10. All suppliers should send invoices referencing the PO number to AP for payment, unless otherwise instructed.

Specific information related to how POs are entered, approved, received on, and modified in the Oracle financial system can be found in the Purchasing User Guide.

3.5 Draw Down POs

A draw down PO is a PO written for a total dollar amount which can be used to facilitate purchases that will require periodic payment over time.
Although draw down POs are created with a PO type Standard, the draw down PO allows the Buyer to submit periodic invoices directly to AP without creating a new PO, or new PO line, for each purchase. Additionally, because a new PO or line item to an existing PO has not been created for each new invoice, there are no recurring approvals required in the Oracle financial system. The invoice amount is deducted from the total value of the approved draw down PO until the amount of the PO is exhausted or all goods/services have been received. Drawdown POs should be created at the onset of a contract for committed funds or annually when possible.

There are two types of draw down POs, those for committed and non-committed funds.

3.5.1 Committed Funds

Committed funds refer to funds that are contractually obligated to be paid. Draw down POs for committed funds follow the same process and requirements as a standard PO.

3.5.2 Non-committed Funds

Draw down POs for non-committed funds can be utilized by campus to enable the purchase and payment of multiple purchases below the bid threshold. Non-committed funds refer to non-contractually obligated purchases.

Draw down POs for purchases can only be utilized for individual orders (i.e. individual drawdowns on the PO) less than $5,000 utilizing university or non-federal sponsored funds, and therefore will not require the solicitation of competitive bids. Individual orders equal to or exceeding $5,000 will need to be made on a separate PO, with all corresponding bid checklists and supporting documentation.

Initial values calculated for POs are to be determined based on planned amounts, budgeted amount or historical spend.

When submitting a Purchasing Checklist & Bid Summary Form for a draw down PO utilizing non-committed funds, the following details should be provided:

1. The estimated total amount of the PO should be listed;
2. Under the Supplier/Consultant Selected section, “Other” should be selected and in the box the following statement should be added “All individual orders/releases will be less than $5,000 and will not include federal funds”; and
3. Under the Price/Cost Analysis section, type the following in the box, “Price reasonableness documentation not required; all individual orders under $5,000.”

New draw-down POs for non-committed funds should be created at the beginning of each fiscal year that they are required.

3.6 No Charge POs

No Charge, or Zero Dollar, POs are normally utilized for transactions where there is no cost to the university, but there is a need to document the transaction for ownership, responsibility or liability reasons (e.g. physical custody of property is granted to the university without transfer of title or accountability). Whenever a supplier intends to leave a good (e.g. piece of equipment, software, etc.) on university property for the purpose of loan or evaluation, it is necessary to pre-establish the ownership rights, the value of the equipment or software, the responsibility and liability for its...
proper use, protection and return. Therefore, commitments for loaned or evaluation goods are to be made via a “no-charge PO”.

Buyers are responsible for assuring university protection, negotiating and documenting the instances where suppliers provide the university with goods as a loan or an evaluation trial in anticipation of making a sale.

All applicable policies and procedures must still be followed if at the end of the loan/evaluation period, it is determined that the university is interested in purchasing the goods. Although there is no cost to the university, contractual terms typically still exist and need to be reviewed with the UCO.

### 3.7 Approval Process

Carnegie Mellon uses the Oracle financial System as the system of record to demonstrate policy compliance and to document various approvals that are required prior to the issuance of a PO. All POs must be approved before they can be sent to a supplier.

POs enter a workflow when submitted for approval in the Oracle financial system. The workflow evaluates the information entered on the PO and determines which, if any, checkpoints must approve the PO.

Each workflow checkpoint has designated approvers who can approve the PO. Some checkpoints are “final approvals” meaning the PO does not also have to go through supervisory approval. If a workflow checkpoint does not have final approval, the PO may then also require supervisory approval if it is above the amount the Buyer has the rights to approve.

A PO cannot be created from a Requisition until it has an ‘approved’ status. In the USA ledger, the Requisition will automatically be approved unless it is forwarded on to someone for approval. When working in the Australia or Qatar ledgers, the Requisition will go to the submitters’ Oracle supervisor (or to the person specified by the requestor in the Forward box) for approval.

In supervisory approval, the system will direct the PO to the submitters’ Oracle supervisor for approval. If that supervisor does not have sufficient rights to approve, the systems will follow the submitters’ supervisor hierarchy until it finds an approver with appropriate rights to approve the PO.

See the [Purchasing User Guide](#) on the Financial Systems User Guides website for additional information about PO approval workflows.

### 3.8 Receiving Goods

When goods are received, the Buyer is to ensure that the delivered materials have been inspected for damage, missing parts or errors in shipment and that the material received is compared to the packing list. For services, confirm that expected services have been performed in accordance with the contractual terms and conditions and that all deliverables have been received as outlined in the applicable contract. If the goods/services have been delivered as expected, create a receipt for them in the Oracle financial system.

Carnegie Mellon’s payment process requires a three-way match for payment of invoices. This means that when an invoice is received from the supplier and entered into the Oracle financial system by AP, it must be matched to both a PO and a receipt in order for payment to be made to the supplier. A receipt acknowledges that the goods or services represented by the invoice have been
received. Invoices for goods or services that do not have a receipt in the Oracle financial system will go on hold and the supplier will not be paid until a receipt is completed.

See the Purchasing User Guide on the Financial Systems User Guides website for additional information about creating PO receipts.

### 3.9 Returning Goods

To return an item, the Buyer should contact the supplier of the item for information on how to process a return. Following the supplier's procedures, the item should be returned directly from the Buyer to the supplier and payment adjustment should be agreed upon at that time. Always request a Return Authorization Number from the supplier prior to returning goods. This facilitates the returned good by ensuring that the supplier is expecting the package and enabling them to more effectively receive it upon delivery. If there is a problem with the return, having this number will be a great benefit.

If the item(s) being returned had already been marked as received in the Oracle financial system, remember to do a return for the item(s) in the Oracle financial system as well. If the invoice for the item(s) was already processed by AP and the payment has already been made, a credit memo should be received from the supplier. If the invoice has been processed but not yet paid, the Buyer should not receive on the PO so that the payment is placed on hold until a credit memo is received or until the corrected purchase is received. If the issue cannot be resolved with the supplier, contact Procurement Services.

See the Purchasing User Guide on the Financial Systems User Guides website for additional information about creating PO returns.

### 4 Payment Terms

Carnegie Mellon’s standard payment terms are Net 30 from the date of the invoice. This means that the net amount, or the total outstanding on the supplier invoice, is to be paid in full 30 days after the goods or services have been received, invoiced and the three-way match has occurred in the Oracle financial system.

Prepayment for goods or services should be avoided.

### 5 Invoice Processing and Credit Memos

All suppliers should send invoices to the university's Accounts Payable (AP) Department for payment. AP will match the invoice with the PO and the Buyer created system receipt, if applicable, and schedule the invoice payment date. The Buyer is responsible for tracking and ensuring that credit memos issued for returned items are received from the supplier in a timely manner and that they are credited to the correct account. AP ensures that all credits memos recorded are consumed through review of the trial balance.

Contact Procurement Services if a dispute with a supplier cannot be resolved.
6 Record Keeping

The Buyer is responsible for assisting in the record keeping process in accordance with the practices of their home Department and university policy. Buyers are required to maintain documentation related to their purchases including: Purchasing Checklist & Bid Summary Forms, contracts and other supporting documentation and send scanned copies to procurement-inbox@andrew.cmu.edu.

7 Regular Maintenance and Closure of POs

The Buyer is responsible for the routine maintenance and closure of POs as appropriate. This aids in ensuring the accuracy, completeness and timeliness of expenses, corresponding payments and available funding.

1. Adjust or clear encumbrances on POs once the true cost of the purchase is known, the purchase has been completed, or the purchase has been cancelled.
2. Cancel POs or lines of a PO that are no longer going to be utilized.
3. Change the Buyer on a PO if a different Buyer takes on the responsibility of managing that PO.

E-Learning Courses & Online Tutorials related to these topics can be found at E-Learning Courses & Online Tutorials website.
## Appendix A - Assistance Using Purchase Orders

 Buyers have the following resources for assistance when utilizing POs:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Assistance Provided</th>
</tr>
</thead>
</table>
| **Financial Systems Help Desk**  | • general guidelines for use of POs  
                                 | • guidance on issues with the Oracle financial system  
                                 | • questions regarding creating, receiving, redistributions, workflow  
                                 | • assistance with obtaining Oracle financial system access  
                                 | • [Purchasing User Guide](mailto:pcrdhelp@andrew.cmu.edu) |
| (412) 268-4666                    |                                                                                       |
| [pcrdhelp@andrew.cmu.edu](mailto:pcrdhelp@andrew.cmu.edu) |                                                                                       |
| NOTE: See [frequently asked questions page](mailto:pcrdhelp@andrew.cmu.edu). |                                                                                       |
| **Procurement Services**         | • assistance with procurement policies and procedures  
                                 | • guidance on purchasing actions including scope or requirements development, solicitation of bids, supplier negotiation, and bid analysis  
                                 | • questions regarding the Preferred Supplier program |
| (412) 268-4309                    |                                                                                       |
| [procurement-inbox@andrew.cmu.edu](mailto:procurement-inbox@andrew.cmu.edu) |                                                                                       |
| **Finance Training**             | • [purchasing training manual](mailto:procurement-inbox@andrew.cmu.edu)  
                                 | • [PO encumbrance clearing tutorial](mailto:procurement-inbox@andrew.cmu.edu)  
                                 | • [all inquiry tutorial (included purchasing)](mailto:procurement-inbox@andrew.cmu.edu) |
| (412) 268-3718                    |                                                                                       |
| [https://www.cmu.edu/finance/training/index.html](https://www.cmu.edu/finance/training/index.html) |                                                                                       |